Understanding Load Profiles

Nina Acosta Mid-Hudson Library System



Why load profiles?

- Suit different requirements
- Optimize workflows
- Implement local cataloging practices
- Work with new vendors
- Work with new record types



How They Work

Take data from incoming MARC records

Profile tells system what to do with that information



Records added to catalog according to rules set by profile



```
EDITING FILE: m2btab.database
                        ^N > NEW line
^U > UNDELETE line ^W > Diacritics coded/DISPLAYED
                 ^B > Begin BLOCK
^D > DELETE line
^X > DELETE char
#for loading New Gale Database records
|||0|0| | |0|n|G|0|@main="b"
|||0|0| | |0|n|G|0|@marc="bi"
|||0|0| | |0|n|G|0|@atab="a"
|||0|0| | |0|n|G|0|@msq="Bib records will be created"
/^999||m|0|12| | |0|n|G|0|#com="ins"@password=""
/^999||z|0|10| | |0|n|G|0|#com="recs"@recs="database"
/^999||x|0|1| | |0|n|G|0|#com="clsi"@clsi="n"
/^999||w|0|1| | |0|n|N|0|#com="test"@test="n"
/^999||v|0|1| | |0|n|N|0|#com="init"@init="n"
/^999||u|0|1| | |0|n|N|0|#com="disp"@disp="n"
/^999||s|0|30| | |0|n|G|0|#com="ip"@itemprefix=""
/^999||0|0|20| | |0|n|G|0|#com="dflt"@dflt="biblio,item"
/^999||t|0|10| | |0|n|G|0|#com="ov"@ov_tag="o[ov_245]"
|||0|0| | |0|n|G|0|@ov action="p"
|||0|0| | |0|n|G|0|@ov protect="b=V023456789hk(970,971)y(856)F28,30"
|||0|0| | |0|n|G|0|@holdsymb=""
#|||0|0| | |0|n|G|0|0pre_map="m2bpre_map."
```

What We Can Do

- Move information
- Add custom fields
- Omit fields and subfields
- Change or remove text



Regular Expressions

Find patterns of numbers, letters or symbols

- . [a-z] = any letter
- [0-9] = any digits
- {2} = Preceding characters repeated the specified number of times

Example:

Match on date format YYY/MM/DD [0-9]{4}/[0-9]{2}/[0-9]{2}



What We Can Do

Protect information:

 Retain specific fields after overlay (keep original info)

Example: Keep the Material Type from the brief record



What We CAN'T Do

- Prevent overlay if Cat Date exists
- Conditionally load data
- Delete record when match is found





To create profiles, we use a code made up of 12 elements

Each part is separated from the next by the pipe symbol



Element 1: MARC Tag

Number of the field you want to work with

600-699||-w|0|0|b|d|0|y|N|0| 700-720||-w|0|0|b|b|0|y|N|0| 730-740||-w|0|0|b|u|0|y|N|0| 752-755||+|0|0|b|y|0|y|N|0| 760-777||+|0|0|b|w|0|y|N|0| 780||+|0|0|b|x|0|y|N|0|

- Allows for a range of MARC tags
- Use indicators to get more specific



Element 2: New MARC Tag

• Load entire MARC tag as a different number

Example:

Load 240 fields as 730 fields

• Create a new field

Example:

Insert custom note field



Element 3: Subfields

- Include all subfields as they are with ' + '
- Specify certain subfields you want to include
 Ex: Putting ' a ' here would load only \$a
- Exclude specific subfields by preceding them with ' ' Ex: ' -h ' on a 245 field would load everything except the GMD
- Specify order of subfields by separating with ": "
 Ex: ' z:u ' would load \$z before \$u even if arranged differently in the incoming record
- Load a subfield as a different subfield with ' > '
 Ex: ' p>b ' would load any instances of \$p as \$b instead



Element 4: Offset

Used mostly with special fields, like Leader or 008

Example: Country code is located 15 characters into the 008 field

008 _ 140620s2014 ilua jb 001 0 eng



Element 5: Number Of Bytes

When specifying an offset, include number of bytes to load (otherwise, set to 0 to include the entire field)

Example:

Country code has up to 3 letters, so number of bytes would be 3

008 _ _ 140620s2014 ilua jb 001 0 eng



Element 6: Record Type

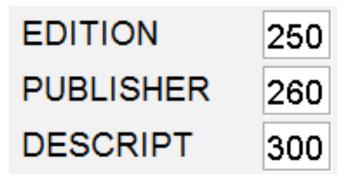
The type of record that will be affected

- **b** : Bibliographic
- i : Item
- • : Order
- **c** : Holdings/check-in
- **a** : Authority
- **p** : Patron



Element 7: Variable Length Field

Specifies which label to assign to each field



Example:

240s were labeled as "Title" fields, but after changing this element, we can label them as an "Additional Title" instead



Element 8: Fixed Length Field

- Tells the system when a fixed length field is going to be affected
 - If element 7 is used, element 8 will be 0.
 - Likewise, if this field is used, element 7 will be blank



Elements 9, 10 & 11

- 9 MARC format
- 10 Permanence
- 11 Pass number



Element 12: Special

This is the fun stuff ...

- Control overlay triggers
- Auto-format fields
- Replace text



Overlay - @ov_tag

- Controls overlay based on particular field (must be indexed variable length field)
- Confirmation test on title field

Example:

Overlay if there is a match on ISBN, but only if the title field also matches



Overlay - @ldx

- Overlay based on record number
- Export batch of records, make edits externally, then re-import
- Avoid overlaying wrong record or creating new one



Overlay - @ov_protect

Protects specified fields from being overlayed

- Fixed length fields use number
- Variable length fields use field group tag

(can specify further by combining with MARC tags)

Options:

- Keep field from original record only, ignore incoming data for field
- Keep existing field only if not in new record, otherwise overlay
- Keep existing field AND add the new one



Overlay - @ov_action

- If zero matches are found:
 - INSERT new record or
 - REJECT record
- If one match is found:
 - OVERLAY matching record or
 - ATTACH linked records
- If multiple matches are found:
 - INSERT new record or
 - **REJECT record or**
 - ATTACH linked record to the first match



Auto-Formatting

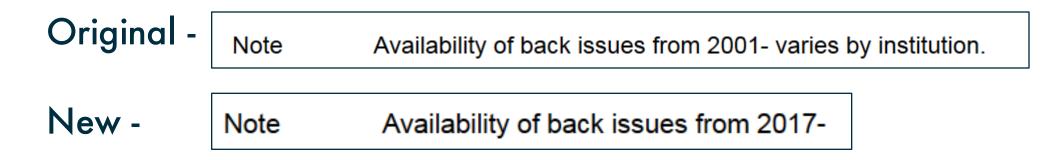
- @speriod strip periods from the end of fields
- %bracket add brackets around GMD
- %strip_blanks control removal of leading blank spaces



Replace Function

Find and replace certain words or patterns of text

Example:





Replace - Translation Tables

EDITING FILE: m2bmap.skipdigit $^{E} > END$ $^{F} > Show FULL$ @case=true @delimiter=! @stop on map=true 245..|aThe (.*)\$0!24514|aThe \0 245.. |aAn (.*)\$0!24513|aAn \0 245..|aA (.*)\$0!24512|aA \0



Record Templates

BIBLIOGRAPHIC template: _b: Bibliographic default									
<u>F</u> ile <u>E</u> dit	<u>V</u> iew	<u>T</u> ools <u>H</u> elp							
					Ð	ß	Ē	≻	6
					Insert	Save	Print	Prompt	Close
MAT TYPE							Move <u>Up</u>		
LANG								Mo	ve <u>D</u> own
LANG	i	eng English	CAT DATE		SUPPRE	SS -			<u></u>
SKIP		0	BIB LVL	m MONOGRAPH	COUNTR	Y u	s Uni	ted Sta	ates
LOCA		none	MAT TYPE	b Book					

- Fill in missing info
- Attach dummy records



Other Possibilities

- @m2b_normalize_020 Normalize ISBN by ignoring spaces, dashes, and other characters
- Select one instance of multiple MARC tags
 - %first selects first occurrence
 - %last selects last occurrence
- @cdate option to set CatDate as today's date





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